

Instructions for GMP Online Users

for telephone assistance 415/749-4994 (option 1)

Note: Do NOT include spaces or periods (“.”) in the username, password or file names of attachments. All username passwords must be a minimum of eight (8) digits long with at least one number, one uppercase and one lowercase letter.

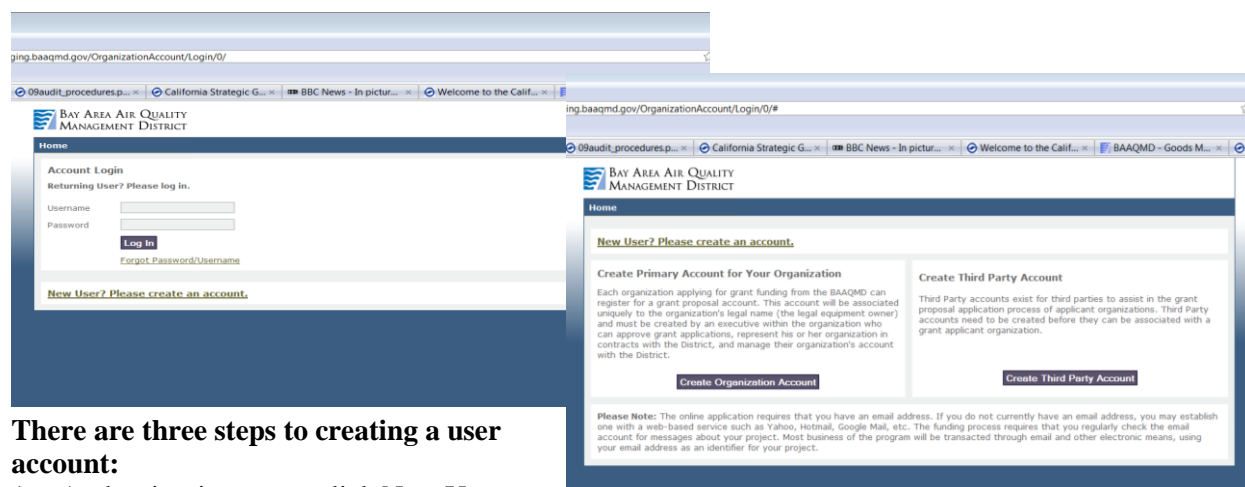
Definitions:

Organization: Your company, or if you are an independent owner-operator, your name. The name of the organization should read as closely to the way CA DMV has the ownership listed as possible.

Third Party: At any time after you have created your Organization account and proposal, you may authorize a third party (other person like a relative, vendor, company staff) to edit and enter data into the proposal screens. The third party cannot create a proposal, initial certifications or sign & submit the proposal. You may change and delete third parties as necessary.

Signing Authority – The legal owner of a truck or fleet, in the case of company-owned trucks, the staff person or company official authorized to sign legal agreements or take on financial obligations for the organization.

Creating Primary Organization Account or Third Party Account



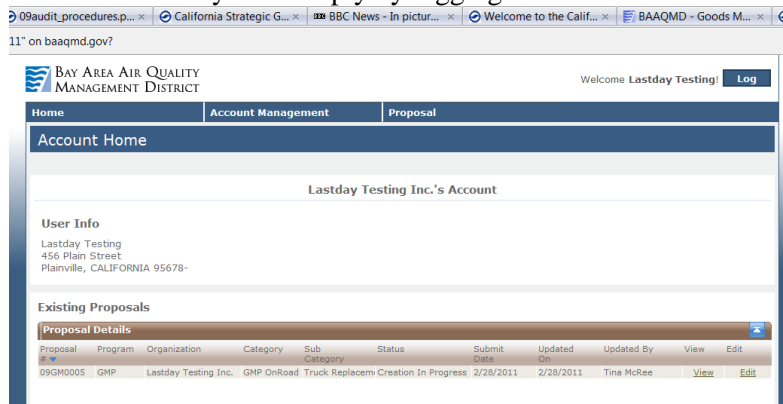
The screenshot displays the BAAQMD website's account creation interface. On the left, a sidebar contains the 'Account Login' section with input fields for 'Username' and 'Password', a 'Log In' button, and a link for 'Forgot Password/Username'. The main content area is titled 'New User? Please create an account.' and features two columns: 'Create Primary Account for Your Organization' and 'Create Third Party Account'. Each column includes a brief description of the account type and a corresponding 'Create' button. A 'Please Note' section at the bottom clarifies that an email address is required for account creation and that the funding process will be conducted via email.

There are three steps to creating a user account:

1. At the sign-in screen, click New User link and you will be directed to a form to complete contact information for yourself (as the primary contact) and your Organization. Only the legal owner, signing authority or other company authority can set up the Organizational account.
2. Complete information and press Create Organization Account, and a message will appear asking you to check your email.
3. On your email, you will be asked to click a link to the application website and this will redirect you to the sign-in screen again to enter your Username and Password. Until you complete this user activation process, you will be unable to sign into the online proposal system. Certain email programs send our email to Junk or Spam folders – be sure to check these folders on your email if you do not see the activation email from the District.
4. To create a new applicant organization account, click on the “Create Organization Account” button, and to create a new third party organization account, click on the “Create 3rd party organization account”.

The system will only create one unique account by Organization name or by Third-party name. Users should make note of their account name, username and password to avoid errors. Upon account activation, an e-mail will be sent to the new user’s e-mail address with a link that the recipient must use to activate and log

into the new account. You cannot log into the system until you respond to this email. After activation, you can return to the system simply by logging in.



Each time you log into the system, you will see three tabs at the top: **Home** (returns you to system home screen); **Account Management** (allows you to manage your Organization or Third Party account); and **Proposal** (allows you to create or edit open proposals, view queue or manage Third Party permissions).

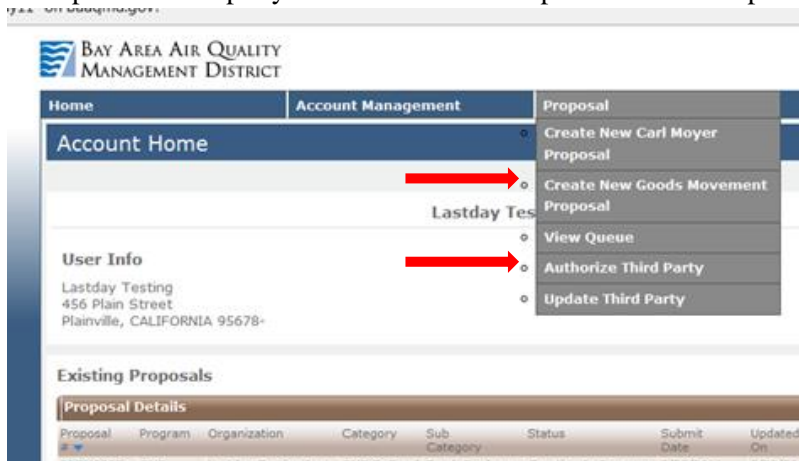
Third Party Authorization

Organization account owners have the ability to grant access to a third party (vendor, contractor, etc.) to enter or edit proposal information pertaining to an existing proposal.

- A third party account not linked to a specific proposal may be created at any time by clicking Create Third Party Account from the main screen.
- Third parties do not have the ability to edit primary organization account information and create or submit proposals, nor can they sign the proposal or initial disclosures on the proposal form.
- The applicant, as the legal owner of the truck, is ultimately responsible for the final proposal information submitted. Please check your proposal for accuracy!

To authorize a third party click the **Proposal** tab at the top and select **Authorize Third Party**. The Organization user will be required to enter the third party account owner's e-mail address, then select the proposals that the third party has access to. The proposal needs to be created prior to third party authorization. Upon successfully authorizing third party, an e-mail notification will be sent to the third party account owner stating that access to the organizational proposal has been granted.

To update a third party account click the Proposal tab at the top and select Update Third Party.



Primary organization users also have the ability to remove third party access by unchecking the checkbox next to the authorized proposal.

Create a New Proposal

After creating your Organization account, sign into the online system and select the **Proposal** tab at the top. From the list, select **Create New Goods Movement Proposal**.

There are four areas of information you will enter for the proposal for each truck:

1. General organization and contact information
2. Existing truck and engine information
3. New/Replacement truck information for the project
4. Operational activity of the existing truck & proposed use of future truck.

General screen hints:

- Required fields are indicated by an asterisk (*). If you do not enter data in a required field, the system will show an error message. Enter the missing information to continue.

- At the bottom of each screen, you are given several choices: Save and Continue saves data you have entered and goes to the next screen; Save and Close saves data and exits to the Home screen; Cancel or exiting a screen without saving will erase any data you have entered. Logging out (using button at top right of Home screen) or closing your browser window will log you off the system and the system has a time-out feature that will log out after 8 minutes of inactivity.
- After completing the data entry for all truck(s) in the proposed project, the signing authority will be required to participate in data entry by initialing all certifications (see below) and signing the proposal.

Screen 1: Proposal General Information

Authorize person to sign contracts: (see definition above) If the primary project contact person and the *signing authority* for your company is not the same, please enter the signing authority information here. Only the signing authority can initial the certifications and sign the proposal.

Fleet size: Enter your total fleet size, meaning all trucks over 14,000 GVWR owned by the applicant organization or independent truck driver/owner (not just the portion of the fleet you are applying for).

Number employees: List yourself and anyone else that is paid to work for your organization.

Annual Gross Income: Enter the amount of annual income for the applicant organization or independent owner-operator last year before taxes were taken out.

Payment option: Applicants are required to choose one of the two grant fund payment options.

- 1.) *Direct Payment* – Grant funds are sent directly to the vendor for the purchased equipment as a two-party check. This may require the grantee's signature before the vendor can cash the check. This form of payment typically takes 30-40 days.
- 2.) *Reimbursement payment* – Grants funds are paid directly to the grantee. Grantees are typically required to pay the vendor in-full before the equipment will be released to them. This form of payment typically takes 60 or more days.

Screen 2: Existing Vehicle Information

CA State Fleet Regulation – All vehicles over 14,000 GVWR are subject to CA regulation. Users are required to select the fleet regulation that most closely applies to the truck.

Registered Owner – Enter the legal owner's name as it appears on the current CA DMV registration for the truck (this might be different from your/the applicant name).

Address information on the existing vehicle screen should record the operating location of the truck (for example: fleets with terminals or yards in various locations may enter an address different from their main company address). Enter the address where the vehicle is parked or located.

Vocation – Enter the primary usage of your truck; select only ONE choice that best matches how the truck is used most of the time. See the Program FAQ sheet for more detail about vocation.

Gross Vehicle Weight Rating (GVWR): The GVWR labeled by the truck's manufacturer can be found on the manufacturer label located in the truck cab. This is not the same as declared weight rating on your DMV registration.

Screen 3: New Equipment (*Replacement Truck*)

Enter information for the type of truck you wish to purchase. The truck and engine model years entered indicate whether you plan to purchase new or used equipment and will trigger funding options to appear. If

you are unable to select certain options (because they are blocked), you may revise your proposal to match the eligible funding categories or contact staff with questions.

Selecting the correct funding amount:

Based on the replacement equipment information you entered, allowable funding options will be highlighted. Click the button beside the option you wish to select. If you wish to apply for a lower amount to improve the competitive ranking of the project select Other and enter your requested amount.

Screen 4: Operational Activity

Current Odometer: Enter current (today's) odometer reading for each truck. If you are unable to enter an odometer reading (e.g., broken meter, etc.) you must contact our staff for assistance. Applicants must provide proof of annual vehicle mileage to participate.

Port Activity Questions: If you plan to enter a CA Port or intermodal railyard with the replacement truck, answer the questions about port activity. To estimate the annual number of visits, it is sometimes easier to consider how many visits per month you will make.

Trade Corridor Activity – Enter the percentage of your total mileage/operating time the truck travels in each trade corridor (for example, if a truck travels between the Bay Area and the Central Valley, trade corridor percentage might be 50% in the Bay Area and 50% in the Central Valley). Enter the percentage of miles driven in California in the past year, and select a 100% or 90% California travel option (if you select 100%, the replacement truck is not able to register IRP or leave CA for five (5) years. (The link to the trade corridor map requires that you scroll to the bottom of the webpage.)

Equipment Action (pop-up box)

After completing the Operational Activity page for each truck, you will be asked what you wish to do next. You may attach required documents, add another truck to your application, return to the home-screen of your proposal or cancel (to return to the operational activity screen).

Upload Attachments

Proposals are not considered complete until attachments are submitted. There are three ways to submit attachments:

1. Attach electronically to your online proposal: when attaching electronic documents, each file name must be different or they will over-write each other (previous documents will be lost); do not include spaces or periods (“.”) in your attachment file names (except for those automatically inserted before the file type, e.g., .jpg, .wpd, .pdf, etc. – these are ok).

2. Fax to 415-749-5020 with your project number or license plate written on the documents.

3. Mail attachments to the District office with project number written on them. All mailings must be received during the calendar week applications close (see website for specific dates). The District Mailing Address is:

**BAAQMD/GMP
939 Ellis Street
San Francisco CA 94109**

As you select an attachment type on the pulldown list, you will see a detailed description of that document. Attach electronic documents by selecting the correct document type from the pulldown menu, browsing your computer for that document and pressing upload when the document appears in the browsing box on the online system. The Comments field allows you to type a brief note or description about the document.

Add New Equipment – The Equipment Action box also gives you the option to add new equipment. By clicking this option, the screen will move automatically to a new Existing Equipment screen and you may enter information for a different truck. If you have similar trucks or a large number of trucks to enter, you may wish to use the **Copy** feature instead.

Using Copy feature: Enter all information for your first truck in this project. When the Equipment Action box appears, select Proposal Home which moves to the screen showing your queue. You will see the first truck on the queue with options to Edit, Copy or Delete.

Press Copy and a copied line will appear, click Edit on this line and then, adjust the different data for each truck on your proposal. For large fleets, you may want to organize your data entry so that you copy trucks with similar characteristics, to reduce the number of fields you must change for each existing truck.

Secondary Proposal#	VIN	Unit Number	Status	Edit/View	Create Copy	Delete
1	1234567890	124	Creation In Progress	Edit	Copy	Delete
2	4	125	Creation In Progress	Edit	Copy	Delete
3	47	126	Creation In Progress	Edit	Copy	Delete

When you have finished entering data for all trucks on this proposal, press the Continue button at the bottom of the Attachments screen, and you will be asked if your proposal is complete (any red areas showing can be clicked to go directly to the incomplete screen). If you plan to send Attachments later, go ahead and answer **Yes** for the attachments question or the screen will not allow you to continue.

Screen 5: Certifications (disclosures) Sign and Submit Proposal

When you have completed all data entry for the trucks in your project, an optional survey screen will appear. Press save and continue after entering information on this screen and you will see the required certifications (or “disclosures”) that must each be initialed by the legal owner/signing authority. The signing authority must sign the proposal form at the bottom.

Definitions of some confusing terms:

- “Match funding” refers to the grantee portion – for example, if your project costs \$125,000 and your grant is \$50,000, the match funding will be \$75,000.
- “Other incentives” refers to any other funding that you will receive (especially from public sources) for this same equipment project. You must enter a number in the field, even if this number is “0.”
- Air quality violations (e.g., opacity, idling) apply to all trucks in a single fleet. If any truck in your fleet has an unpaid (outstanding) citation, it may block your proposal from consideration. Please pay outstanding violations prior to submitting your proposal.

Submitting the proposal

When you are ready to submit the proposal, click **Sign & Submit**. Once submitted, you will not be able to enter or change information in the proposal although you can upload attachments until the solicitation deadline. If you need to change information in your proposal, leave your proposal unsubmitted until a later date and submit prior to the deadline. To correct information in a submitted proposal, you must call the Program Office (415-749-4994 (option 1)) for assistance. After you submit your proposal, an email containing a PDF copy of your proposal will be sent to your email address so that you can view all data that has been entered for your application.